
Underrepresented sectors and technologies: Introduction

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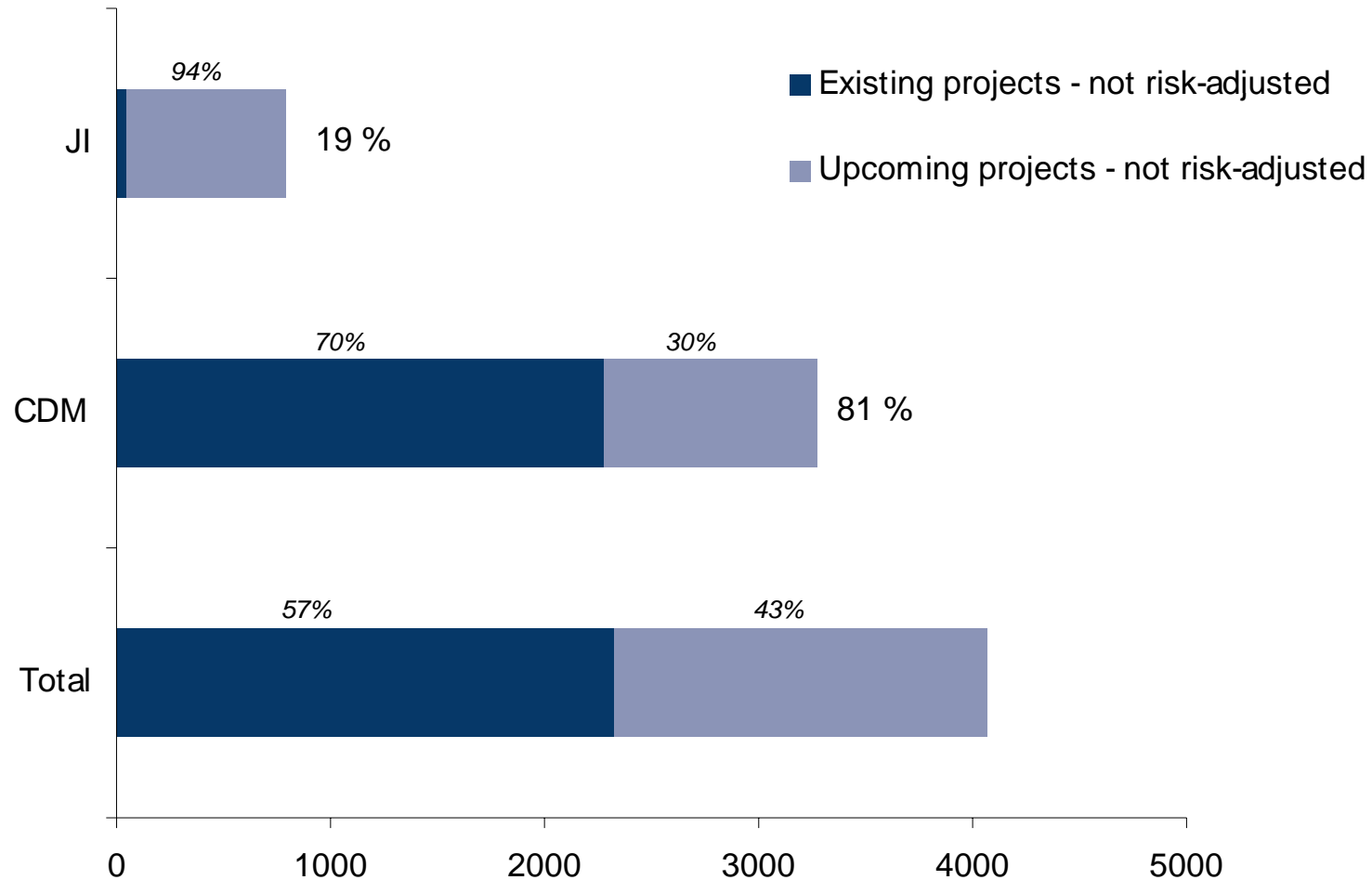


Upcoming supply: Important factors

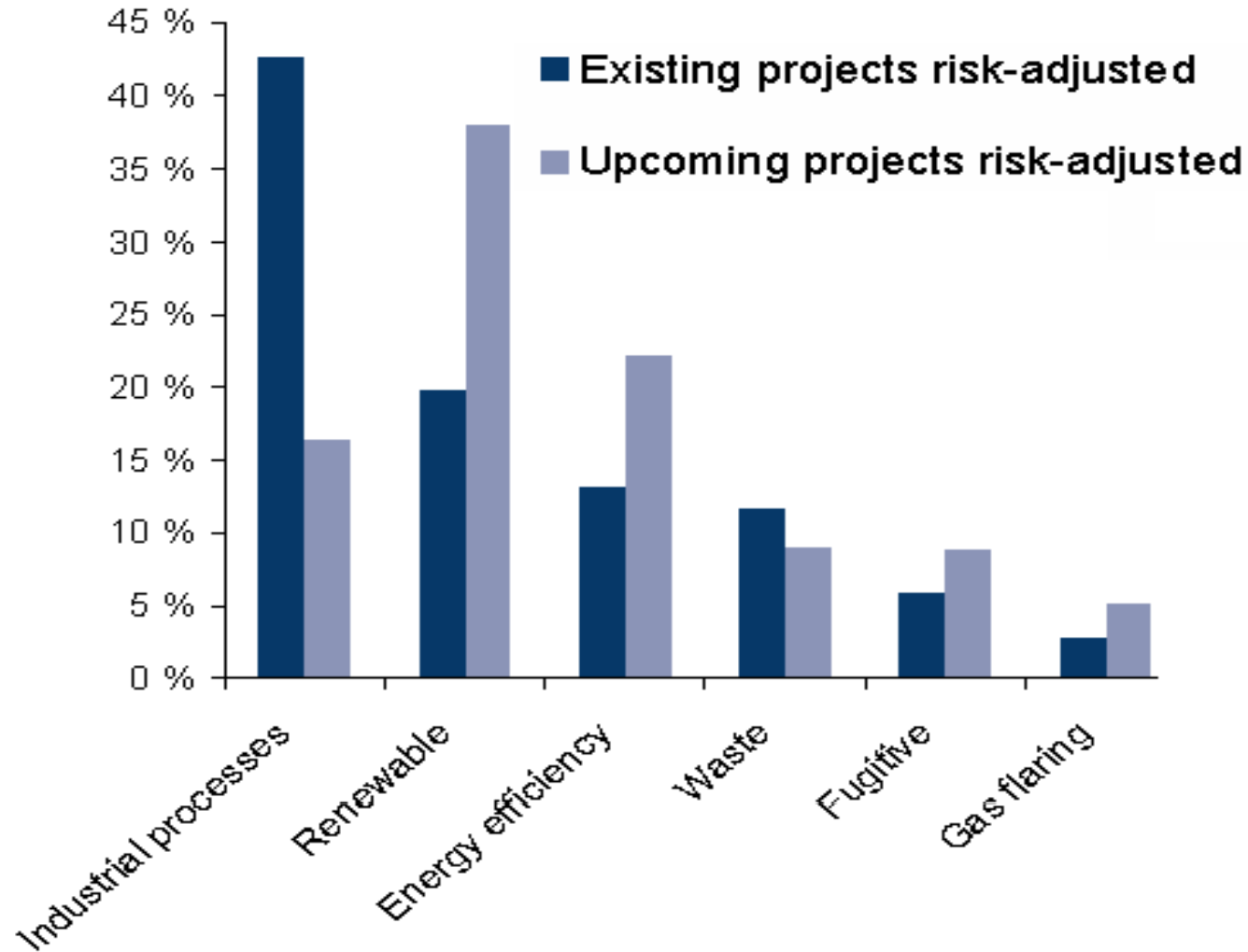
General factors	Project specific factors
<p>Supply</p> <ul style="list-style-type: none">➤ CDM/JI regime post-2012➤ Chinese approval policy➤ Russia supply➤ Ukraine supply➤ EU accession countries supply➤ OPEC supply➤ Generic EB/JISC factors <p>Demand</p> <ul style="list-style-type: none">➤ EU ETS demand➤ Japanese demand➤ Canada demand➤ Other Annex 1 demand➤ US demand➤ Australia demand	<p>Technical factors</p> <ul style="list-style-type: none">➤ Remaining technical potential➤ Managerial awareness➤ Project complexity <p>Economic factors</p> <ul style="list-style-type: none">➤ Project cost➤ Expected future CER/ERU price➤ EUA price <p>Political factors</p> <ul style="list-style-type: none">➤ New methodologies➤ Project types approved➤ National legislation and institutions



Overall picture -2012: Face value

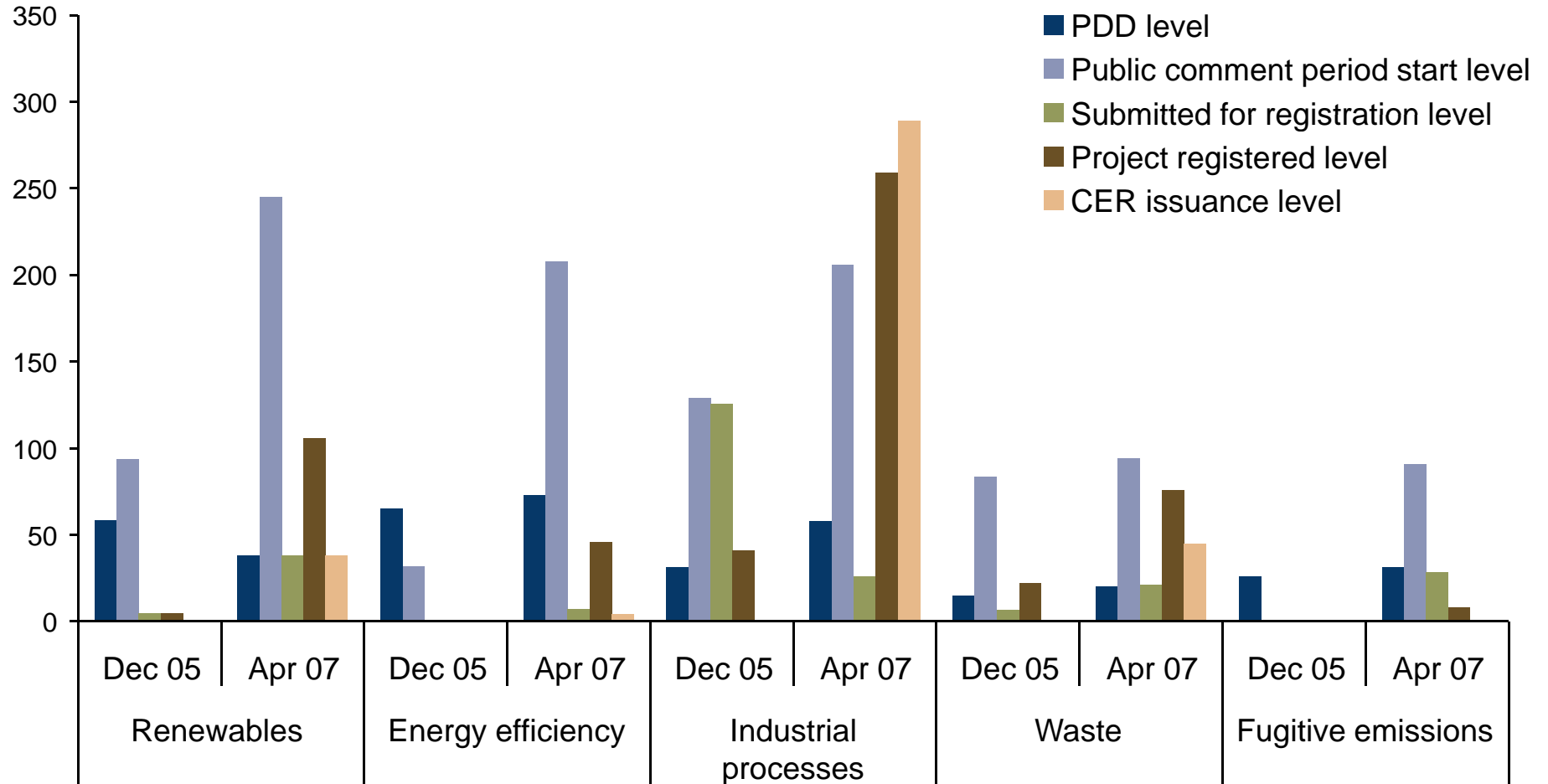


Relative volume of existing vs upcoming CDM projects (MtCO2e): Risk-adjusted



Source: Point Carbon

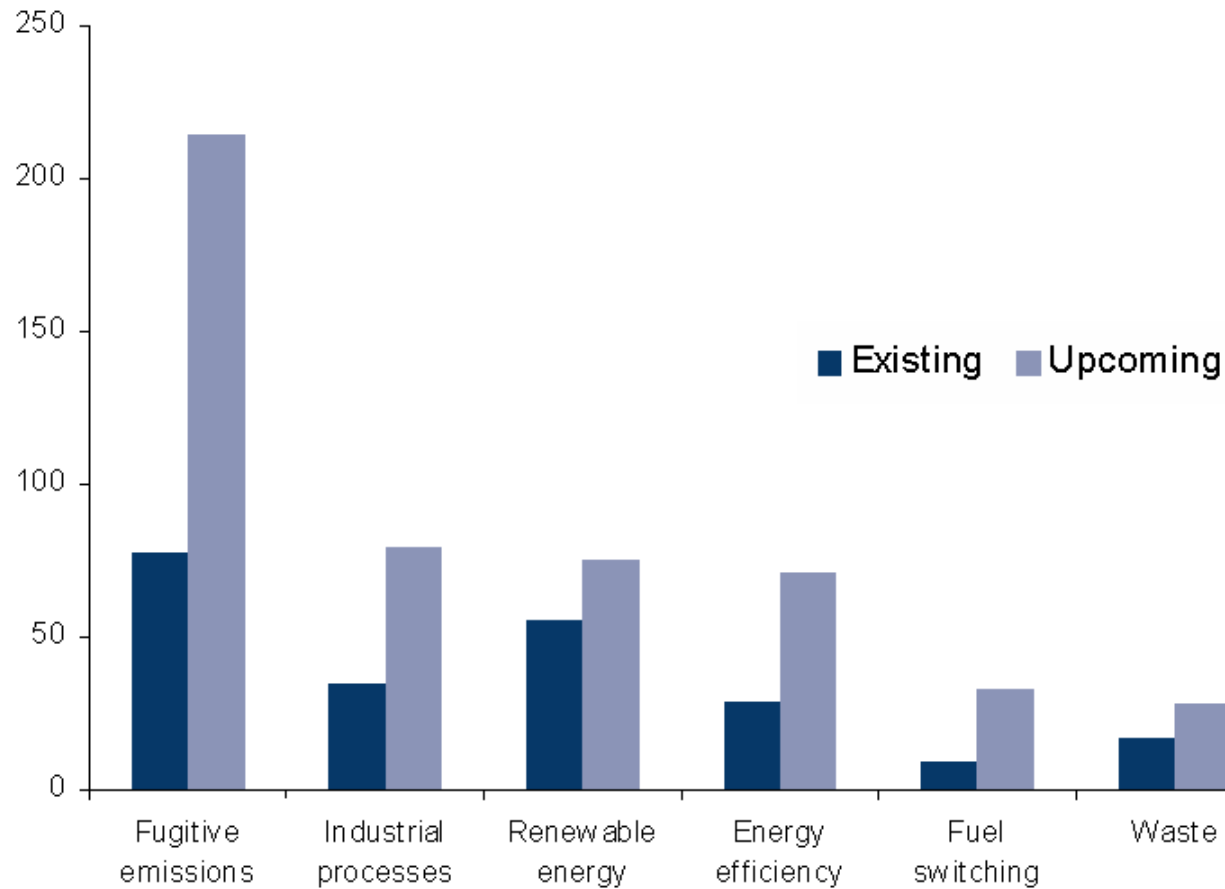
CDM stages, volume 2005 vs 2007: Face value



Source: Point Carbon



Existing vs upcoming JI projects (MtCO₂e): Face value



Unknowns

- Biofuels
- Carbon capture & storage
- New capacity HFC-23
- Programmatic CDM



Conclusion

- On the decline: HFC, N2O
- On the rise:
 - Renewables, energy efficiency, Coal methane and gas flaring reductions
 - JI, particularly fugitive emissions (but small relative to CDM)

